

# Agency HR Advisors

**Human resource (HR) advisor:** The primary HR contact for a specific agency, who is responsible for implementing and administering the PMP within that agency. An HR advisor can also be a PMP employee, PMP supervisor, or PMP reviewer.

## Online PMP Menu Options

The Online PMP menu options assigned to you are based on your PMP role. HR advisors have expanded access to Online PMP to assist them in administering the program within their agencies.

HR advisors have access to view performance plans and performance evaluations for all employees within the agency. However, HR advisors do not have the ability to approve or revise performance plans and evaluations for employees who are not their own subordinates.

All HR advisors can see the **SUBORDINATES** menu, which contains the following functions:

- **Add/Remove Subordinates**—If the HR advisor is also a PMP supervisor, this option allows him or her to add and remove subordinates from his or her roster of subordinates. If the HR advisor is not a PMP supervisor, this function does not display.
- **Select/Release Reviewer**—If the HR advisor is also a PMP supervisor, this option enables him or her to select and release the appropriate PMP reviewer. The reviewer must be at a higher level in the organization than the supervisor. The reviewer is commonly referred to as the employee's second-level supervisor. For employees that report directly to an agency director, there is no reviewer. If the HR advisor is not a PMP supervisor, this function does not display.
- **Performance Plan**—This menu option allows the HR advisor to view the performance plans of all PMP employees within the agency. If the HR advisor is also a PMP supervisor, this option allows him or her to create performance plans for subordinates.
- **Performance Evaluation Form**—This menu option allows the HR advisor to view performance evaluations of all PMP employees within the agency. If the HR advisor is also a PMP supervisor, this option allows him or her to create performance evaluations for subordinates.
- **Submission Status**—This menu option allows the HR advisor to view the submission status of agency employees' performance plans and performance evaluations for the current fiscal year.
- **2<sup>nd</sup>-Level Review/Approval**—This option allows a PMP reviewer to access and approve the performance evaluations that have been approved by PMP supervisors. If the HR advisor is not a PMP reviewer, this option does not display.

HR advisors also have access to the **REPORTS** menu. There are several agency-specific reports the HR advisor can access to monitor agency compliance, rating trends, etc. See Appendix B for a list of reports and a description of their functions.

All Online PMP users have access to the **HELP** menu.

If the HR advisor is also a PMP employee, he or she has access to all of the **PERSONAL DRAFTS** menu options described in the “PMP Employees” section of this guide (see page 11).

## **Online PMP System Administration**

### **Setting up New Users in the HR Applications Gateway and Online PMP**

HR advisors are the primary point of contact for agency employees who need access to the HR Applications Gateway and Online PMP. All access requests must come through HR advisors. New Online PMP users should contact their agency HR advisors to request access to the HR Applications Gateway and Online PMP.

New users must complete parts one and two of the Security Access Form for HR Applications Gateway and submit it to their HR advisor. HR advisors submit completed access forms to DCOP.

The DCOP security administrators activate the new user in the system. The new user should then login to the gateway with a user name and temporary password. The new user is prompted to change the password.

It takes approximately five business days for a new user to be activated in the HR Applications Gateway system.

If a user successfully logged in once, but the system does not allow the user to reenter the next time, the user should contact their agency’s IT specialist.

### **Password Security**

HR advisors *do not* have access to individual users’ password information. Passwords are private, and users should not share them with other users. An Online PMP user who shares a password with another user is responsible for all transactions completed under that name and password.

The DCOP Performance Management Unit does not have access to individual passwords.

### **Releasing Subordinates of Former Supervisors**

All requests to release subordinates of supervisors who have left the DC government must be made by HR advisors. If a PMP supervisor is no longer employed with the District government and did not release subordinates in Online PMP before leaving, HR advisors should email the DCOP Performance Management Unit at [pmpupdate@dc.gov](mailto:pmpupdate@dc.gov). Include the name of the former PMP supervisor and all subordinates in your email.

HR advisors should make sure that all PMP supervisors release their subordinates before leaving District government.

### **Agency Participation**

The HR advisors are responsible for implementing the PMP within their agencies and monitoring compliance. Agency compliance with the PMP is included as a goal in every agency director’s performance contract with the Mayor, and each agency director receives a numeric rating based on his or her agency’s timely compliance with the PMP. The compliance rating scales,

established by the city administrator, are used to evaluate each agency's PMP compliance. (See Appendix C.)

## Online PMP Reports

Several online reports help HR advisors monitor agency compliance. The reports are created in Crystal Reports, a reporting software tool. Online PMP prompts you to load this software if it's not already loaded on your PC.

A limited number of Crystal Reports licenses are available in the District. If all licenses are currently being used, a prompt states, "There are not enough Concurrent Access Licenses to log you on." Try to log on to the reports at another time. Off-peak hours of early morning and evening are best.

Close out of Crystal Reports as soon as you have finished viewing and printing reports. This frees up a license for the next user.

HR advisors are strongly encouraged to print out their agency's detail submission reports on each of the due dates listed in the compliance rating scales chart (Appendix C). For example, print out performance evaluation detailed reports on Friday of the first full week of November, and each Friday thereafter through the month of November. This helps verify submission summary reports.

## Using PMP Reports

On the **GENERAL** menu, click **Reports**.

Select **Report Type** and **Fiscal Year** from the drop-down boxes.

Click **View Report** to access the report.

The screenshot shows a web application interface for the District of Columbia's Performance Management system. At the top, there is a header with a blue background and gears, featuring the "Performance MANAGEMENT" logo on the right. On the left side, there is a vertical navigation menu with the following links: "SUBORDINATES", "Performance Plan", "Performance Evaluation Form", "Submission Status", "GENERAL", "Reports", "User Profile", "Help", "Return to Applications Gateway", and a red star icon. Below the star icon, the text reads "Anthony A. Williams, Mayor" and "Government of the District of Columbia". The main content area has a dark blue header with the word "Reports" in white. Below this header, there are two dropdown menus: "Select the Report Type:" with "Performance Plan - Submission Summary" selected, and "Select a Fiscal Year:" with "2003" selected. A "View Report" button is located below these dropdowns.

*Online PMP Reports Menu*

(See Appendix B for a list of Online PMP reports and descriptions of their functions.)

## **Monitoring Quality of Performance Plans and Evaluations**

Performance plans and evaluations should be conducted thoughtfully and thoroughly. Plans and evaluations that are submitted with “dummy data” or meaningless goals and narrative comments are not accepted as official documents, and do not count toward agencies’ overall submission summary. It is the role of the HR advisor to ensure a high level of quality for all performance plans and evaluations submitted by their agencies.

## **Collecting Evaluations for Official Personnel Folders**

HR advisors collect the signed hard copies of their agencies’ performance evaluations and submit them to the DCOP Performance Management Unit for filing in the employees’ OPFs by December 1.